# Acquisition Phase Checklist

## Purpose

The Acquisition Phase Checklist will assist you in determining which tools and templates support a specific Enterprise Resource Planning (ERP) or Continuous (CBPI) change initiative. The purpose of the tools and templates in AEIOO's Transformation Management Guide is to provide a starting point for Army program managers in planning a transformation management initiative. All tools and templates can be modified to fit a specific ERP or CBPI program's transformation management needs.

## Acquisition Phase Checklist

| Transformation Management Activity | Tools & Templates | Description |
|---|---|---|
| Transformation Management Planning | Acquisition Deliverables Checklist | Identifies tools and templates by program phase that support an ERP or CBPI change initiative |
| Transformation Management Planning | Transformation Management Measures | Outlines specific transformation management measurements that can be used to support an ERP and CBPI program |
| Leadership & Stakeholder Management | Leadership Alignment Assessment Report | Provides leadership assessment results gathered from one-on-one interviews with program leadership team |
| Leadership & Stakeholder Management | Leadership Alignment Plan | Outlines plan for program leadership to be actively engaged with ERP or CBPI program |
| Leadership & Stakeholder Management | Stakeholder Involvement Planning Template | Identifies a plan to involve each of the stakeholder/stakeholder with transformation management initiative |
| Communications | Communications Planning Vehicles | Assists in identifying the vehicles that are most appropriate for supporting ERP or CBPI program communication goals and distributing communications themes and messages to stakeholders |
| Communications | Communications Plan Template | Outlines EPR or CBPI program communication plan including description, message, audiences, purpose, vehicle and developer |
| Communications | Communications Plan | Sample Communications Plan |
| Organizational Alignment | Defining Positions | Profiles jobs/roles to get an understanding of what types of positions may be required and |

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|---|---|---|
| | | then develop position descriptions with the skills, knowledge and abilities which can be used to staff the new organization based on CBPI and/or ERP implementation |
| Organizational Alignment | Position Profiles | Outlines job/roles to support CBPI and/or ERP implementation |
| Organizational Alignment | Work Unit & Job Design Guidelines | Develops tactical design for executing new process design including jobs, work units and leadership's role |
| Organizational Alignment | Work Unit Management Matrix | Identifies primary responsibilities for work unit |
| Learning | Course Development Tracking Template | Provides format to track course development for ERP or CBPI learning |
| Learning | Update Learning Strategy | Update learning strategy to reflect any changes to learning approach as needed. Learning strategy provides an overall approach for the learning component of an ERP or CBPI program. In addition, the strategy includes an overview of the primary program learning activities and will serve as a baseline for managing the learning scope. |
| Learning | Train-the-Trainer Sample Template | Provides sample template that can be leveraged to prepare train-the-trainer session |
| Learning | Train-the-Trainer Feedback Template | Captures train-the-trainer feedback information that can be used as a continuous improvement opportunity |